

Public Calendar Author Guide

Project Name: Public Meeting Calendar

Date: 03/28/16

Platforms: Web

Agency: Secretary of the State

Author: Tim Whitney

Document Version: 1.0_11/10/14



Table of Contents

Administration Tool	3
User Roles and workflow	3
New Administrator Request:	4
New Author User Request:	4
Removal of a User:	5
Adding a new Group/Agency:	5
Workflow for EVENT Creation:	6
Create an Event	6
Create new location	11
Uploading Minutes after the Event	12
Delete a Meeting	14
Cancel a Meeting	14
Other Author Functions	16
Link to use on agency web sites	16
List/Edit all my Agency's Meetings	18
List of Approved Locations	19
Public Calendar Usage	21
Calendar View	21
List by Agency	23
Event Detail	23
Keyword Search	28
Glossary	29



Administration Tool

The Public Meeting Calendar administration tool is used by state agencies and the Secretary of the State's office (SOTS) to create and post meeting information (events) to a public website.

User Roles and workflow

There are two roles:

An "Administrator" role—used strictly by SOTS—who will have the following rights in the system.

Administrator Menu

Manage Users Manage Agencies Manage Locations

Author Menu

Create a New Event List/Edit only my Meetings List/Edit all my Agency's Meetings Approved Locations Manage My Contact

The other role is "Author." This role enables agency personnel to post events with agendas and minutes, select venues, and edit their contact information. Authors cannot use the "Administrator Menu" they can use only the "Author Menu."

Author Menu

Create a New Event List/Edit only my Meetings List/Edit all my Agency's Meetings Approved Locations Manage My Contact



New Administrator Request:

- Only SOTS employees will be administrators of the Public Meeting Calendar application.
- SOTS managers will send requests for new admin users to the primary SOTS administrator at Taffy.Womack@ct.gov.
- This SOTS Administrator will then send an email to CTI_DevDesignTeam@egov.com with the:
 - o Title "SOTS Calendar Admin User" in the subject line
 - Name of the person
 - Person's email address
- Connecticut Interactive will then load the information into the database and create a Userid and Password.
- Connecticut Interactive will then email the new user with the Userid and Password.
- SOTS will provide any training after the project.

New Author User Request:

- The SOTS administrator will collect the information needed from the agency requesting an ID. They will send an email to CTI_DevDesignTeam@egov.com with the:
 - o Title "SOTS Calendar Author User" in subject the line
 - Name of the person
 - o Person's email address
 - Names of agencies the author will create events for. If the agency is not in the system then the administrator will have to create a new record for that agency. Then the administrator will need to add the agency to the user id.
- Connecticut Interactive will then load the information into the database and create a Userid and Password.
- Connecticut Interactive will email the new user with the new Userid and Password.
- SOTS will provide any training after the two training sessions provided by Connecticut Interactive.



Removal of a User:

- The SOTS administrator will send an email to CTI_DevDesignTeam@egov.com with the:
 - o Title "SOTS Calendar USER removal" in subject line
 - Name of the person
- Connecticut Interactive will remove the user from the database
- Connecticut Interactive will then email the administrator a confirmation of the removal.

Adding a new Group/Agency:

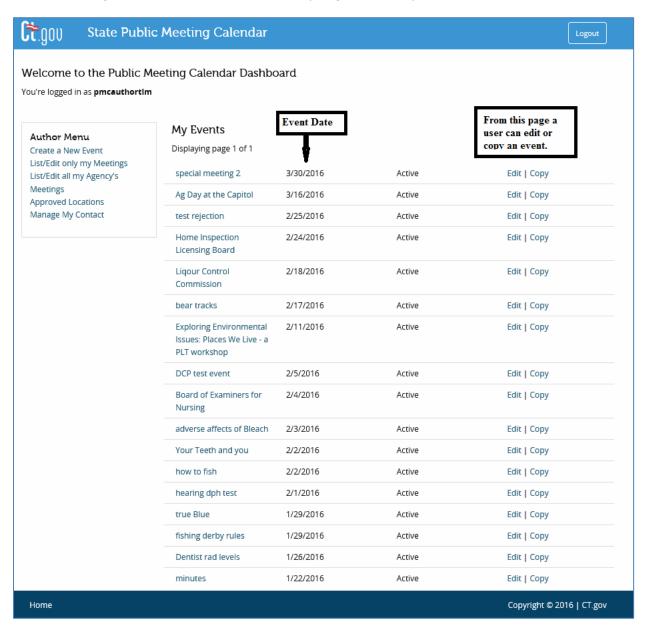
- A new group or agency wishing to utilize the Public Meeting Calendar will email the SOTS administrator with the following mandatory information:
 - o The official group or agency name
 - The group or agency website
 - o The agency name if the group is a subset of an agency
- The administrator will then create the new group/agency record using the administration tool.



Workflow for EVENT Creation:

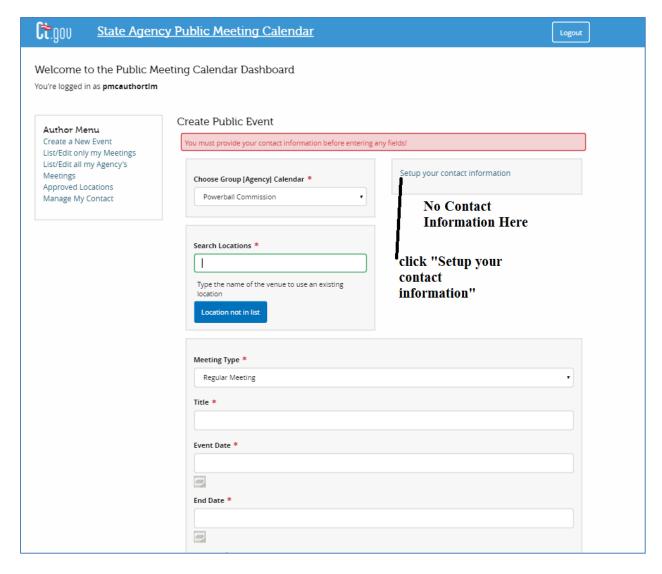
Create an Event

This is the page an author will see when they log into the system.



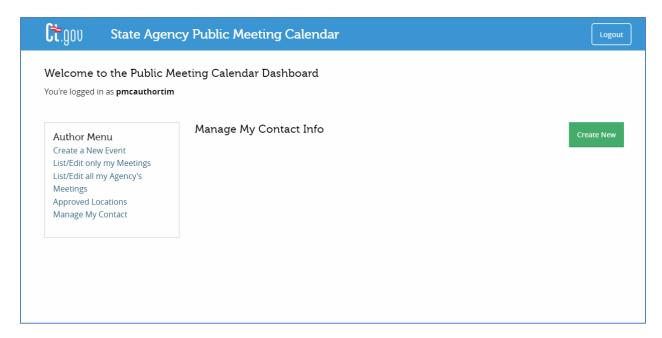
To create an "Event" an author will select "Create a New Event" in the side menu. If the user has not setup their contact information, they will see the following.



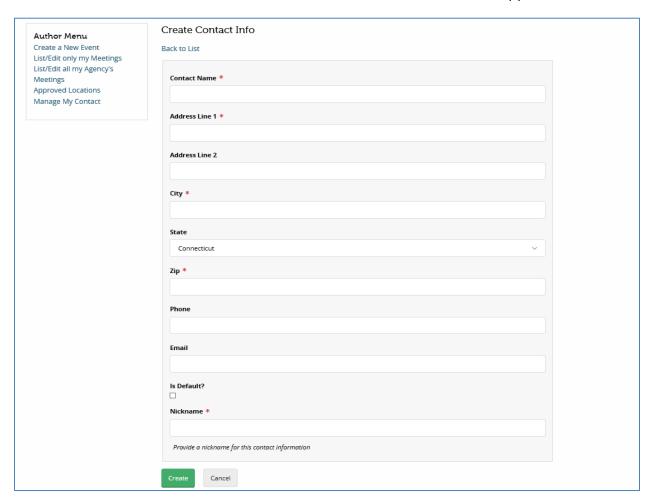


The user must update their contact information in order to create an event. The user should select "Manage My Contact" from the side menu to edit their contact information. When they do this, they will see the following screen.



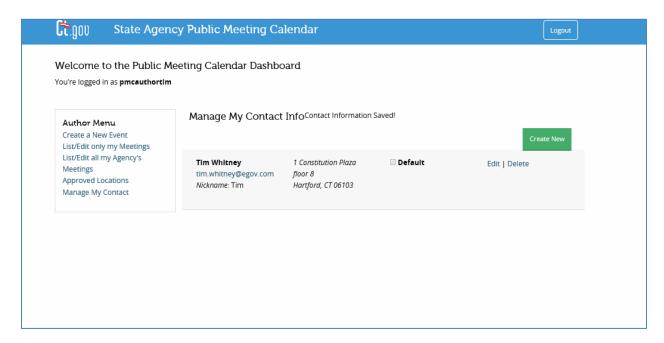


From here, the user should select "Create New" and the next screen will appear.



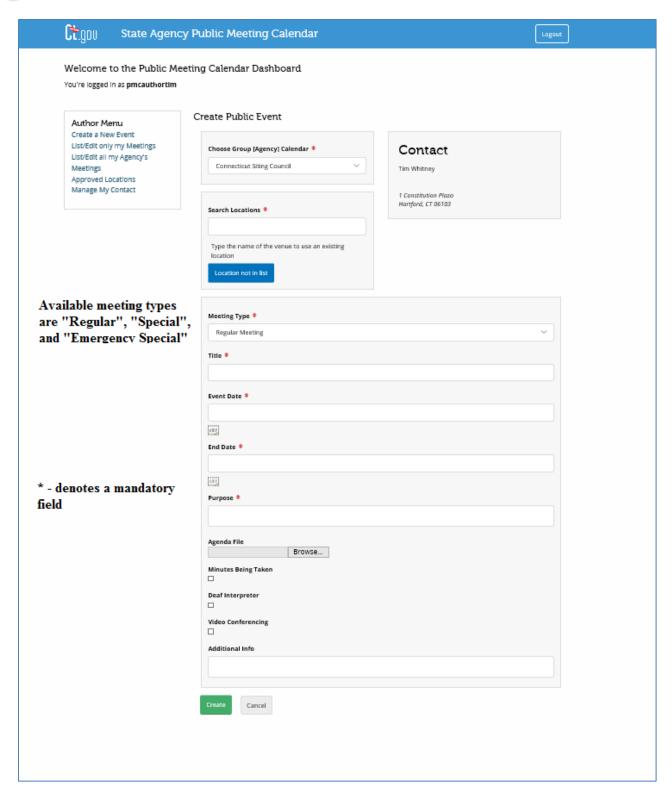


The fields with "*" (an asterisk) next to them are required fields. Fill in the fields and press "Create" and it will take you to following page. Notice you can edit and delete your contact information.



Select "Create a New Event" from the side menu and the system will take you to the following screen. Notice that the contact information is displayed with no warning message.





The fields with asterisks are required fields to create an Event. The user can also add an agenda by uploading it. There are checkboxes to note in the event details if there will be

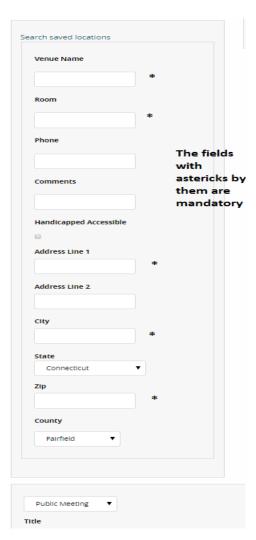


minutes taken, a Deaf Interpreter available, video conferencing available. In addition there is a place to add additional information if the author chooses.

To select a location, the author can type the first few letters of a location and select from a drop down list. If the author does not know what locations are available, he can select "Approved Locations" in the side menu to see what venues exist. If the author cannot find the venue he or she needs, the author can create a new location.

Create new location

To create a new location, select the "Location not in list" button on the Create Public Event screen and the "search location" box will expand. See below.

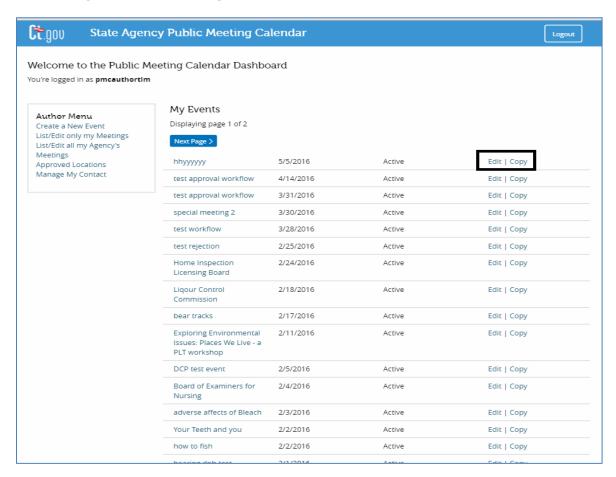




Once the author has entered all the mandatory fields for a new location as well as all the mandatory fields for an event, he or she can press the create button and both the event and location will be created bringing the user back to the "List My Events" page.

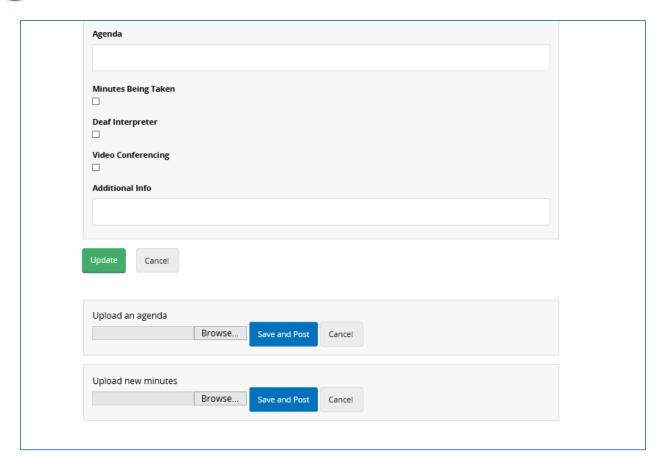
Uploading Minutes after the Event

After the event has occurred, the author might want to post the minutes of the meeting. To do this the author should log into the Public Meeting Calendar Administration tool. The "My Events" page is the default page.

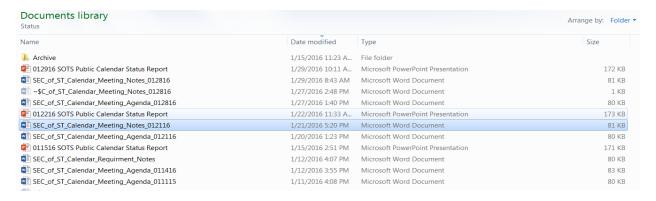


Notice that an author has the capability to copy an event as well as edit it. To add minutes the author should select the "Edit" button. The "Edit Event" page will then appear. Scroll to the bottom of the page and you will see the following.



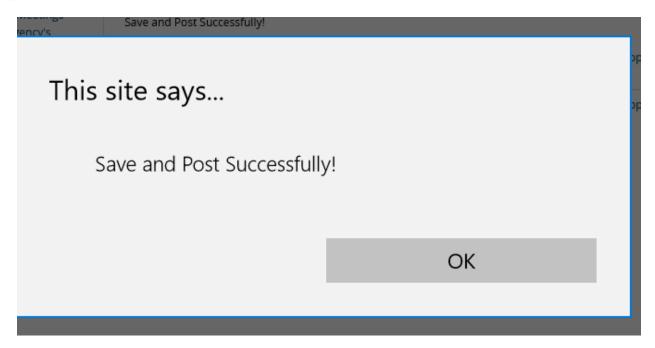


Select "Browse" next to "Upload new minutes" to open an explore menu and select a minutes file to upload from your computer.



You will then see the name of the minutes file in the text box next to "Browse". Click "Save and Post" and the following message box should appear.





Click "OK" to be taken back to the "My Events" page. Use the same process to post agendas. Post agendas after the event is created or at the time an event is made.

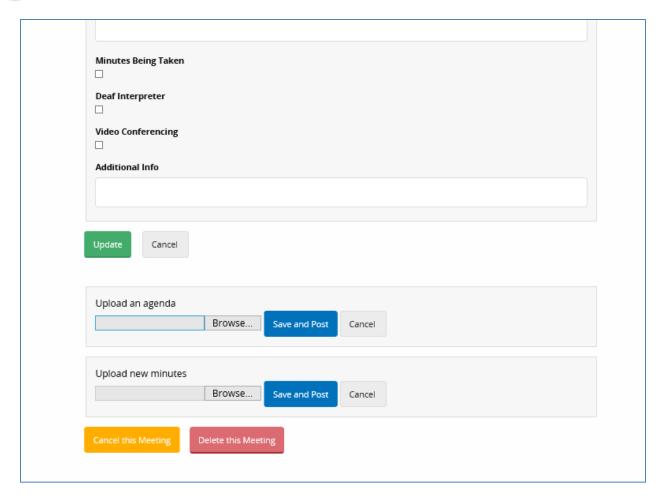
Delete a Meeting

If an author wishes to delete a meeting after it has been posted to the public website, then he or she must contact the SOTS administrator and have the administrator perform the function. The administrator does this by logging onto the administration tool and going to the "List My Events" page. The administrator will select "Delete" next to the event to be removed from display in the public calendar. The event will continue to appear in the author's "My Events" list, but it will be marked "Deleted" and will be available for viewing only.

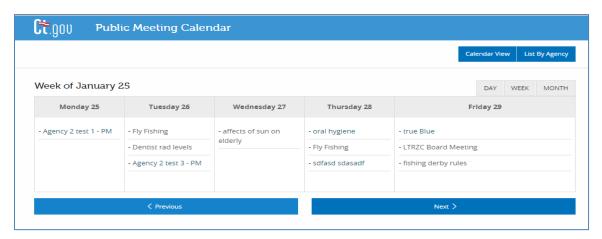
Cancel a Meeting

Both authors and administrators can cancel meetings. Only meetings that have not yet occurred can be canceled. It is assumed that past events have taken place and therefore, cannot be canceled.



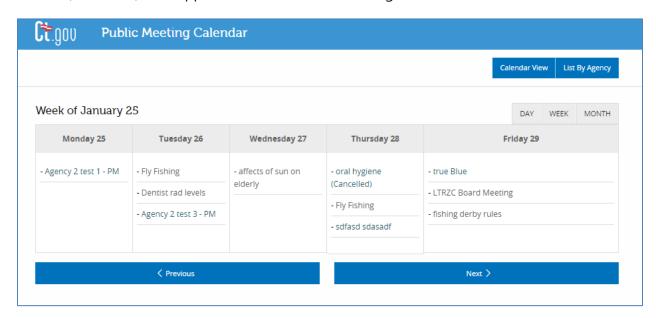


Here is a view of the Calendar detail showing the Event "-oral hygiene" (in the "Thursday 28" column) before cancel.





Once an event is "Cancelled", the event will still appear on the public calendar but the words "(Cancelled)" will appear under the title. See image below.



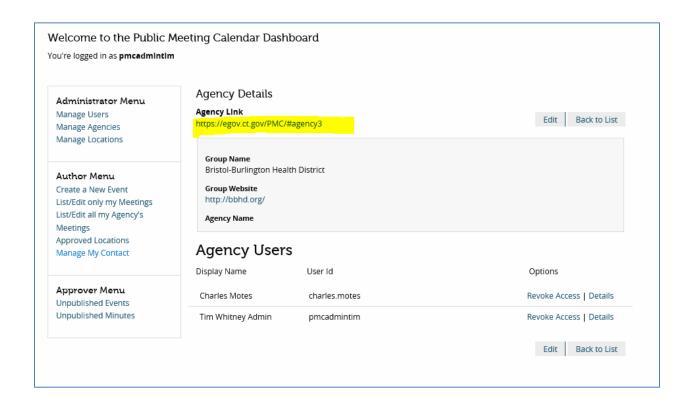
The event will still appear on the author's "My Events" list but it will remain cancelled.

Other Author Functions

Link to use on agency web sites

When a SOTS administrator creates an agency record, an "Agency Link" is composed as highlighted in the image below. The administrator should provide the author and/or the agency's webmaster with this link.



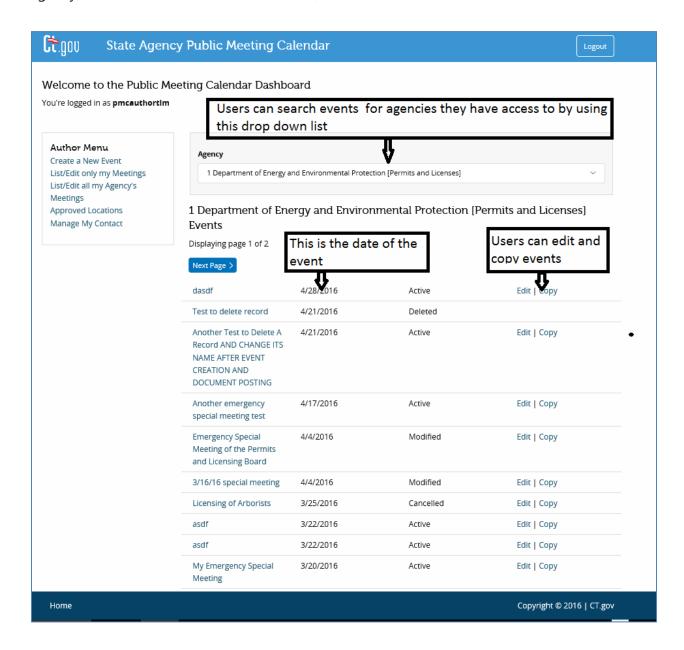


This link can be placed on the agency's home page or other web pages. When a user clicks this link, they will be taken to the public calendar website with only that agency's events displayed.



List/Edit all my Agency's Meetings

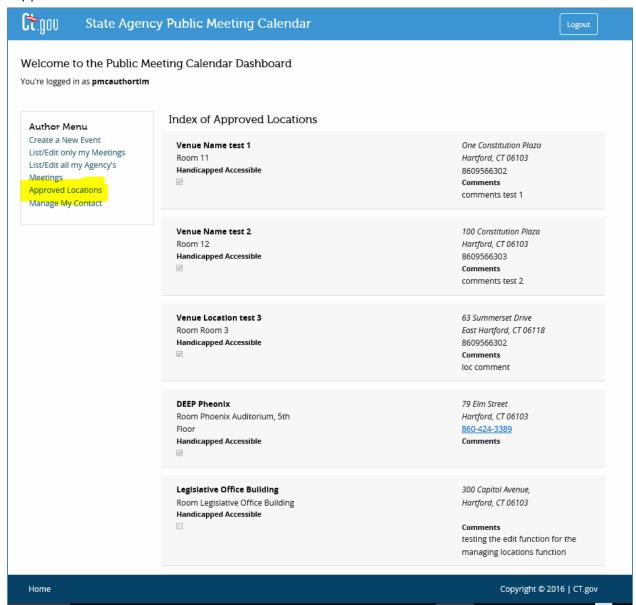
If an author with access rights to a particular agency would like to edit an event for that agency, even one she or he did not create, the author can use this function.





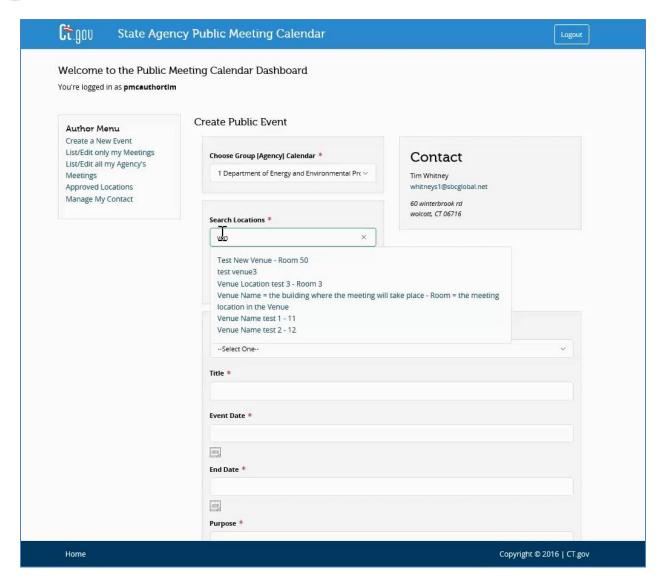
List of Approved Locations

If an author would like to see what rooms are listed for a site, he or she can use the "Approved Locations" function shown in the side menu.



Authors can use these locations when creating events. The just have to start typing the name of the venue and a list will appear with the names of the locations starting with the characters they type.

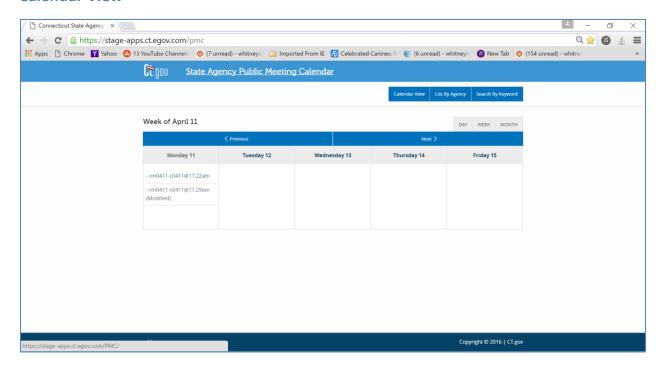






Public Calendar Usage

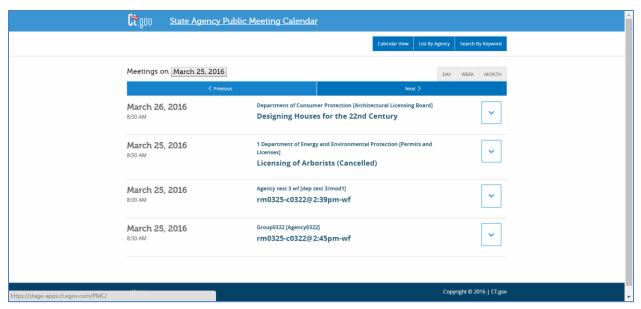
Calendar View



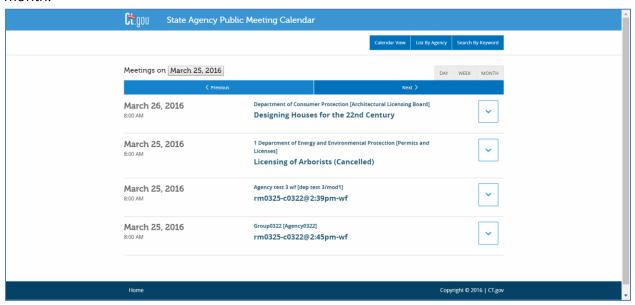
The Home page for the calendar will be the Week View. Users can find events on different weeks by using the "Previous" and "Next" buttons.

If "Day" is selected a page similar to the one below should appear with events showing for that specific day.





If "Month" is selected the following screen should appear showing events for a given month.

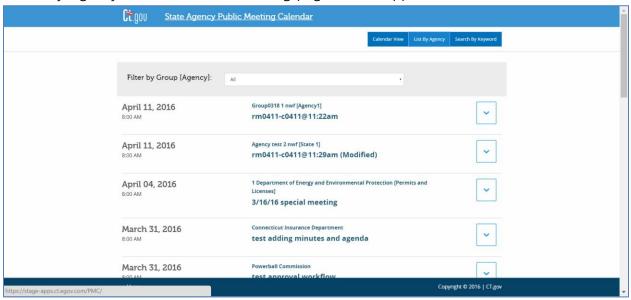


The listing of events will change by month using the "Previous" and "Next" buttons.

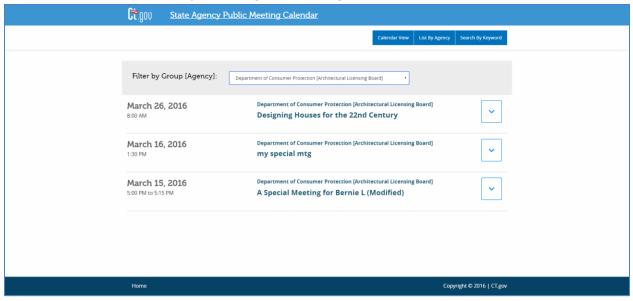


List by Agency

If "List by Agency" is selected the following page should appear.



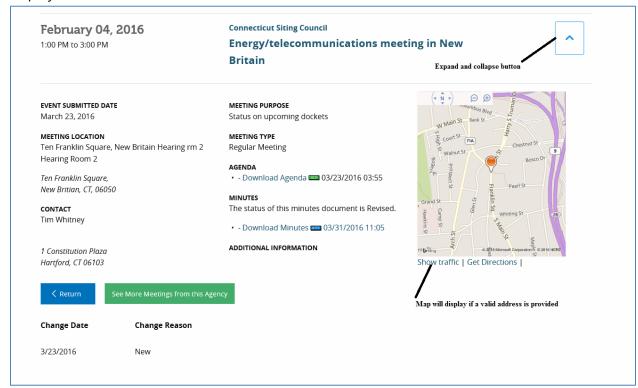
Users can filter the results by selecting different agencies from the drop down list.



Event Detail



Select the expand button shown on the following screen and the event details will be displayed.



Any user can download available minutes or agendas.

The "Return" and "See More Meetings From this Agency" buttons are disabled in this view. The reason is because you have the "expand /collapse" buttons and you are already showing all the meetings from the agency.

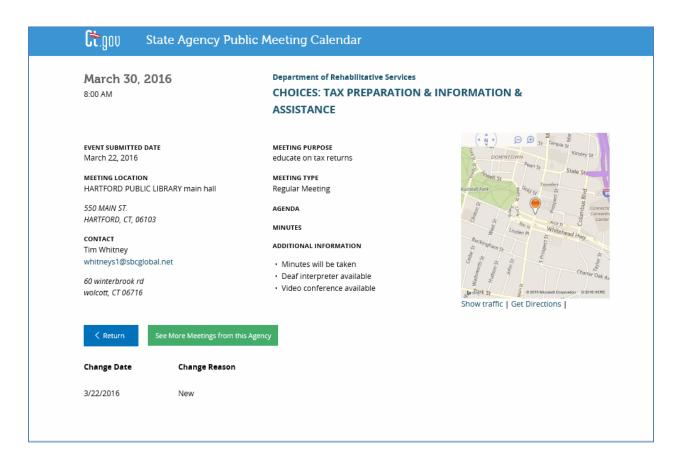
To view other events in the results list for the agency you selected, use the collapse button to continue viewing the list.

To return to the calendar view for all agencies, click the "Calendar View" button on the top of the page and it will take you back to the calendar view.

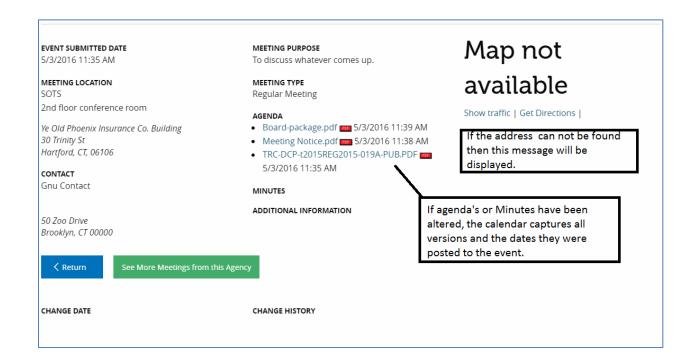




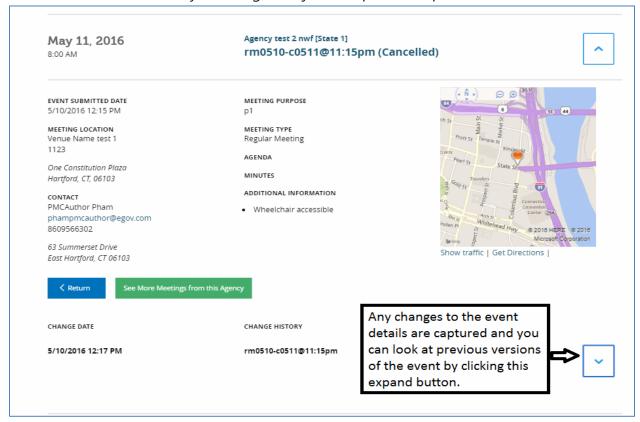
Next, click on the event title for one of the events and you will see an event detail page similar to the one below.





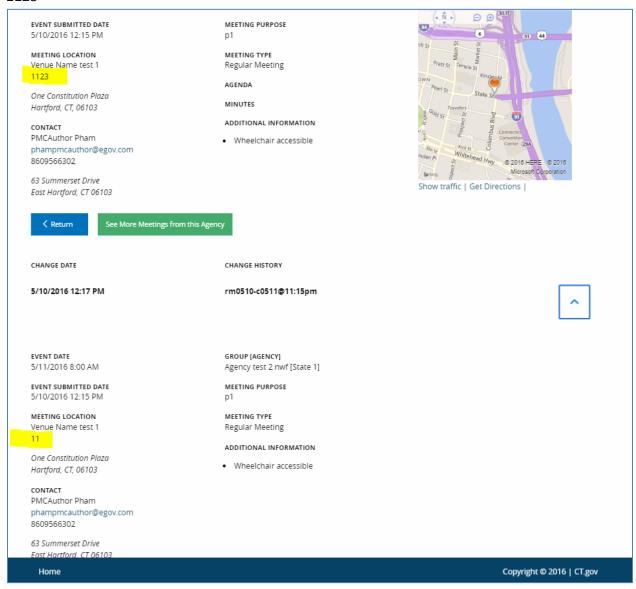


Any changes to an event's details are captured, and previous versions of the event details can be viewed by selecting its adjacent expand/collapse button.





Here is the event with the history expanded. Notice that the previous version had a meeting location of "Venue Name test 1 11" and the current version shows "Venue Name test 1 1123"



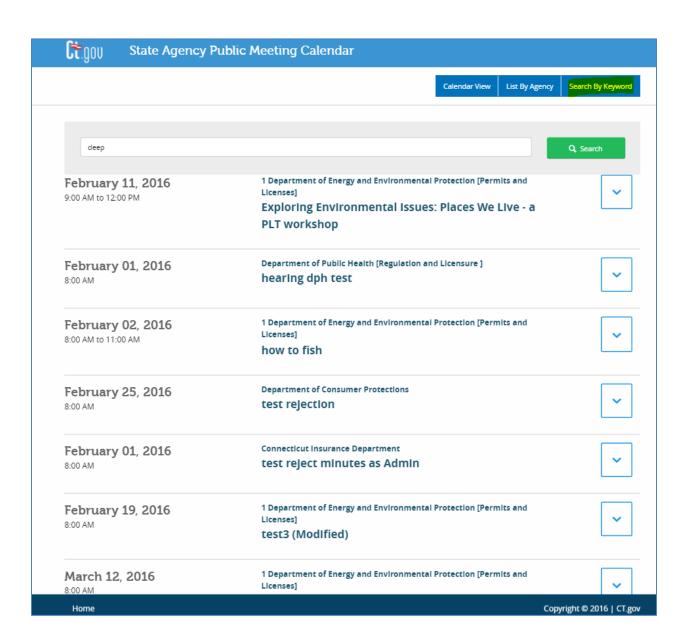


Keyword Search

You can use the Keyword search function on the calendar to look up events. You must enter at least three characters to perform a search. The search looks for any of the words you entered in the following fields:

Group/Agency Name Contact Name Location/Venue

NameEvent Type Purpose Title





Glossary

Event - a meeting.

Group Name The name of a group holding a meeting, e.g., a board, commission, committee, department, agency etc.

Agency Name- The name of a larger or parent agency under which a meeting "Group" is organized. For example, the State Properties Review Board (group) is placed within the Dept. of Administrative Services (agency). Some groups will not have an associated agency name.

Event Submitted Date – The date and time, a meeting event is posted to the SOTS Public Meeting Notice website.

Venue - the building or agency where a meeting is held.

Contact - the person to contact with questions about the meeting. The contact person does not have to be the person who posted the meeting event.

Title - the "subject" of a meeting.